

## Delegates in Concur

These instructions show how to set up delegates and assistants/ arrangers in Concur. If you would like the Business Office to assist you with your travel/ reimbursement requests and preparing of reports, you will have to set these up. We are not able to see your Concur profile if we are not assigned as a delegate.

### **Request Delegates:**

Log into SSO- Go to Concur; Profile, Profile Settings.

On the left side of the screen, under Request Settings- click on Request Delegates.

Your Information

- Personal Information
- Company Information
- Contact Information
- Email Addresses
- Emergency Contact
- Credit Cards

Travel Settings

- Travel Preferences
- International Travel
- Frequent-Traveler Programs

Request Settings

- Request Information
- Request Delegates
- Request Preferences
- Request Approvers
- Favorite Attendees

Expense Settings

- Expense Information
- Expense Delegates
- Expense Preferences
- Expense Approvers
- Company Car
- Favorite Attendees

### Request Delegates

Delegates | Delegate For

Delegates are employees who are allowed to perform work on behalf of other employees.  
Expense and Request share delegates. By assigning permissions to a delegate, you are assigning permissions for Expense and Request.

<input type="checkbox"/>	Name	Can Prepare	Can Book Travel	Can View Receipts	Can Use Reporting	Receives Emails	Can Approve	Can Approve Temporary	Receives Approval Emails
<input type="checkbox"/>	KING, MARGARET mking@shs.tamu.edu	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
<input type="checkbox"/>	PETERSON, TANJA tpeterson@shs.tamu.edu	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
<input type="checkbox"/>	VANDENBRINK, ABBY avandenbrink@shs.tamu.edu	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>

Select "Add", and start typing your delegate's last name or email address.

There are several options available:

- Concur users can assign delegates to help prepare requests for them. If you would also like your delegate to be able to book travel arrangements for you, please check that box as well.

The recommended setting is that each user assigns the Business Office staff as delegates:

- Brittany Pekar ([bpekar@shs.tamu.edu](mailto:bpekar@shs.tamu.edu))
- Laura Campos ([lcampos@shs.tamu.edu](mailto:lcampos@shs.tamu.edu))
- Abby VandenBrink ([avandenbrink@shs.tamu.edu](mailto:avandenbrink@shs.tamu.edu))

#### Backup

Randee Heuberger ([rheuberger@shs.tamu.edu](mailto:rheuberger@shs.tamu.edu))

Maggie King ([mking@shs.tamu.edu](mailto:mking@shs.tamu.edu))

## Expense Delegates:

Setting up your expense delegates is the same process and most of the time it is already set up if you did the request delegate section. Just double-check if your delegates are assigned:

**Your Information**

- Personal Information
- Company Information
- Contact Information
- Email Addresses
- Emergency Contact
- Credit Cards

**Travel Settings**

- Travel Preferences
- International Travel
- Frequent-Traveler Programs

**Request Settings**

- Request Information
- Request Delegates
- Request Preferences
- Request Approvers
- Favorite Attendees

**Expense Settings**

- Expense Information
- Expense Delegates
- Expense Preferences
- Expense Approvers
- Company Car
- Favorite Attendees

### Expense Delegates

Delegates  Delegate For

[Add](#) [Save](#) [Delete](#)

Delegates are employees who are allowed to perform work on behalf of other employees.  
Expense and Request share delegates. By assigning permissions to a delegate, you are assigning permissions for Expense and Request.

<input type="checkbox"/>	Name	Can Prepare	Can Book Travel	Can View Receipts	Can Use Reporting	Receives Emails	Can Approve	Can Approve Temporary	Receives Approval Emails
<input type="checkbox"/>	KING, MARGARET mking@shs.tamu.edu	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/> <input type="text"/>	<input checked="" type="checkbox"/>
<input type="checkbox"/>	PETERSON, TANJA tpeterson@shs.tamu.edu	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/> <input type="text"/>	<input checked="" type="checkbox"/>
<input type="checkbox"/>	VANDENBRINK, ABBY avandenbrink@shs.tamu.edu	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/> <input type="text"/>	<input checked="" type="checkbox"/>